

The below listing of claims will replace all prior versions, and listings, of claims in the application.

Listing of Claims:

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1. (canceled) A method for processing data within a server, with the steps:
- (1) establishing a filtering and sorting system for a client within a separate account on an interactive server;
  - (2) setting and modifying upon request filtering and sorting and reporting parameters for each account;
  - (3) providing timely access to a source of data and/or data bases as a means for filtering and sorting data and retrieving valuations, or other client information, graph or report; and
  - (4) maintaining access to data and data bases for all accounts up to the level of service paid in full at the time of a request for service.
2. (canceled) The method of claim 1 where the server is configured to all a client to interact with a database on the server.
3. (canceled) The method of claim 2 used to test and examine different scenarios with a variety of data sources.
4. (canceled) The method of claim 1 where financial data is processed to provide valuations and sorted lists.

5. (canceled)            The method of claim 4 where the client criteria are selected from one or more: open interest, percent if called, percent if not called, in the money, out of the money, option month, spread between called and not called, minimum and maximum search criteria, price of stock, volume of the stock or option, volatility, or Black-Scholes value.

6. (canceled)            The method claim 5 where stock option data is filtered and sorted and stored.

7. (canceled)            The method of claim 6 where the data is processed from a browser compatible page.

8. (canceled)            The method claim 1 where financial data is downloaded from an Internet source to the server after the close of the market or from other market sources during the market day.

9. (canceled)            The method of claim 8 used for valuations of one or more months or long term leap options.

10. (canceled)           A method for selecting stocks, bonds, and derivatives with the steps:

- (1)    selecting criteria for sorting and filtering within an interactive server;
- (2)    setting the selected criteria within the server to establish a proprietary account;

- (3) establishing an online link with the server;
- (4) accessing timely financial data;
- (5) processing the data via test criteria; and
- (6) retrieving processed data.

11. (canceled) The method of claim 10 with access to data and data bases both within the server and on the Internet.

12. (canceled) The method of claim 10 where the processed data is one or more of valuation, sorted list, graph or report.

13. (canceled) The method of claim 10 where the financial data is stock options obtained during the market operation.

14. (canceled) The method of claim 10 where the financial data is stock options obtained after the market close.

15. (canceled) The method of claim 14 where the selection criteria include at least one of open interest, percent if called, percent if not called, in the money, out of the money, option month, spread between called and not called, minimum and maximum search criteria, price of stock, volume of the stock or option, volatility, Black Scholes value, price earnings ratio, earnings or earnings change, % volume change, number of shares or capitalization, range between the high and the low, or put options.

16. (canceled) A financial data service method with the steps:

- (1) supplying stock and stock option investment criteria for setting up or modifying a proprietary account on an interactive programmable server as a means for setting filtering and sorting and retrieving parameters for processing financial data;
- (2) establishing an online link with the server;
- (3) transferring financial data for processing;
- (4) processing the financial data; and
- (5) retrieving data in set format.

17. (canceled) The method of claim 16 where an Internet source provides financial data obtained for stock and stock options after the close of trading for the day.

18. (canceled) The method of claim 17 where the criteria for valuations and sorted lists for stock options are one or more of: open interest, percent if called, percent if not called, in the money, out of the money, option month, spread between called and not called, minimum and maximum search criteria, price of stock, volume of the stock or option, volatility, or Black-Scholes value, price earnings ratio, earnings or earnings change, % volume change, number of shares or capitalization, range between the high and the low, or put options.

19. (canceled) The method of claim 18 wherein stock option valuations and sorted lists are retrieved within 15 minutes of transferring the financial data.

20. (canceled)            The method of claim 16 wherein an individual investor interacts with a database on the server to test and examine different scenarios.

21. (currently amended)      A method of identifying financial instruments meeting user-defined investment criteria, comprising the steps of:

retrieving financial instrument data from at least one data source;

processing the financial instrument data to identify values for a plurality of searchable parameters for particular financial instruments in said financial instrument data;

receiving user-defined search criteria for said searchable parameters;

comparing the user-defined search criteria with the values identified for the searchable parameters for the particular financial instruments; and

identifying at least one of the financial instruments having values for the searchable parameters matching the user-defined search criteria;

transmitting to the user for display data identifying at least one of the financial instruments having values for the searchable parameters matching the user-defined search criteria;

receiving modified user-defined search criteria for said searchable parameters;

comparing the modified user-defined search criteria with the values identified for the searchable parameters for the particular financial instruments;

identifying at least one of the financial instruments having values for the searchable parameters matching the modified user-defined search criteria; and

transmitting to the user for display data identifying at least one of the financial instruments having values for the searchable parameters matching the modified user-defined search criteria.

22. (original) The method of claim 21, wherein the financial instruments are stock options.

23. (original) The method of claim 21, wherein the financial instruments are stocks.

24. (original) The method of claim 21, wherein the financial instruments are bonds.

25. (original) The method of claim 21, wherein the financial instruments are commodities.

26. (previously amended) The method of claim 21, wherein said step of processing the financial instrument data to identify values for a plurality of searchable parameters comprises the step of calculating data values for the searchable parameters from the financial instrument data.

27. (previously amended) The method of claim 26, wherein said step of calculating data values for the searchable parameters from the financial instrument data comprises the step of calculating values for at least one of the following search parameters:

Black-Scholes value, percent if called, percent if not called, in the money, out of the money, volatility, earnings change, and spread between called and not called.

28. (previously amended) The method of claim 21, wherein the step of comparing the user-defined search criteria with the values identified for the searchable parameters comprises the step of searching financial instrument data comprising at least one of the following: open interest; option month; spread between called and not called; price; volume; volatility; price earnings ratio; earnings change; percentage volume change; number of shares; range between high and low values; and put options.

29. (original) The method of claim 21, comprising the further step of:  
confirming that a user is authorized to request a search of the searchable parameters.

30. (original) The method of claim 29, wherein said step of confirming that a user is authorized to request a search of the searchable parameters comprises the step of confirming that a user has paid prior to executing a search of the searchable parameters.

31. (original) The method of claim 29, wherein said step of confirming that a user is authorized to request a search of the searchable parameters comprises the step of confirming that a user has registered prior to executing a search of the searchable parameters.

32. (original) The method of claim 21, further comprising the further steps of:  
establishing accounts for users, and

storing in relation to the accounts at least one user-defined set of criteria for searching the searchable parameters.

33. (original) The method of claim 21, wherein said user-defined search criteria comprises at least one range of values for said searchable parameters.

34. (original) The method of claim 33, wherein said at least one range of values comprises a maximum value and a minimum value.

35. (original) The method of claim 33, wherein said at least one range of values comprises values greater than a user-defined value.

36. (original) The method of claim 33, wherein said at least one range of values comprises values less than a user-defined value.

37. (original) The method of claim 33, wherein said at least one range of values comprises a range of percentages.

38. (original) The method of claim 21, wherein said step of accepting user-defined search criteria for said searchable parameters comprises the step of receiving user-defined search criteria over the Internet.



39. (original) The method of claim 38, comprising the further step of accepting user-defined search criteria formatted by a Web browser.

40. (original) The method of claim 21, wherein the step of identifying a set of financial instruments comprises the step of transmitting data identifying a set of financial instruments across the Internet to the user.

41. (original) The method of claim 40, further comprising the step of formatting the data identifying the set of financial instruments for receipt by a Web browser.

42. (original) The method of claim 21, further comprising the step of storing the values identified for the set of searchable parameters in a database.

43. (canceled) The method of claim 21, further comprising the step of accepting revised user-defined search criteria for said searchable parameters.

44. (currently amended) A computer-readable medium comprising computer-executable instructions for identifying financial instruments meeting user-defined investment criteria, the computer readable medium being readable by a computer to process the instructions to perform the following steps:

retrieving financial instrument data from at least one data source;  
processing the financial instrument data to identify values for a plurality of searchable parameters for particular financial instruments in said financial instrument data;

receiving user-defined search criteria for said searchable parameters;  
comparing the user-defined search criteria with the values identified for the  
searchable parameters for the financial instruments having values matching the user-defined  
search criteria; and

identifying at least one of the financial instruments having values for the searchable  
parameters matching the user-defined search criteria;

transmitting to the user for display data identifying at least one of the financial  
instruments having values for the searchable parameters matching the user-defined search  
criteria;

receiving modified user-defined search criteria for said searchable parameters;  
comparing the modified user-defined search criteria with the values identified for the  
searchable parameters for the particular financial instruments;

identifying at least one of the financial instruments having values for the searchable  
parameters matching the modified user-defined search criteria; and

transmitting to the user for display data identifying at least one of the financial  
instruments having values for the searchable parameters matching the modified user-defined  
search criteria.

45. (currently amended) A method of providing financial data to a user over a  
computer communications network, comprising the steps of:

retrieving financial instrument data from at least one data source;

creating a database of searchable data from the financial instrument data, said database comprising for each of the financial instruments values for a plurality of searchable parameters;

receiving user-defined search criteria via the computer communications network;

searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the user-defined search criteria; and

returning a representation of at least one of the plurality of financial instruments having values for the searchable parameters satisfying the user-defined search criteria to the user over the computer communications network;

receiving modified user-defined search criteria via the computer communications network;

searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the modified user-defined search criteria;

returning a representation of a least one of the plurality of financial instruments having values for the searchable parameters satisfying the modified user-defined search criteria to the user over the computer communications network.

46. (original) The method of claim 45, wherein the financial instrument data relates to stocks.

47. (original) The method of claim 45, wherein the financial instrument data relates to stock options.

48. (original) The method of claim 45, wherein the financial instrument data relates to bonds.

49. (original) The method of claim 45, wherein the financial instrument data relates to commodities.

50. (original) The method of claim 45, wherein said step of creating a database of searchable data comprises the step of calculating data values derived from the financial instrument data.

51. (original) The method of claim 45, wherein said step of creating the database of searchable data from the financial instrument data comprises the step of calculating values for at least one of the following: Black-Scholes value, percent if called, percent if not called, in the money, out of the money, volatility, earnings change, and spread between called and not called.

52. (original) The method of claim 45, wherein said step of searching the database of searchable data comprises the step of searching for defined values of at least one of the following data items: open interest; percent if called; percent if called; percent if not called; in the money; out of the money; option month; spread between called and not called; minimum and maximum search criteria; price; volume; volatility; Black-Scholes value; price earnings ratio; earnings change; percentage volume change; number of shares; range between high and low values; and put options.

53. (original) The method of claim 45, comprising the further step of:  
confirming that a user is authorized to request a search of the searchable parameters.

54. (original) The method of claim 53, wherein said step of confirming that a user is authorized to request a search of the searchable parameters comprises the step of confirming that a user has paid prior to executing a search of the searchable parameters.

55. (original) The method of claim 53, wherein said step of confirming that a user is authorized to request a search of the searchable parameters comprises the step of confirming that a user has registered prior to executing a search of the searchable parameters.

56. (original) The method of claim 45, comprising the further steps of:  
establishing accounts for users, and  
storing in relation to the accounts at least one user-defined set of criteria for searching the searchable data.

57. (currently amended) A computer-readable medium comprising computer-executable instructions for identifying financial instruments meeting user-defined investment criteria, the computer readable medium being readable by a computer to process the instructions to perform the following steps:  
retrieving financial instrument data from at least one data source;

creating a database of searchable data from the financial instrument data, said database comprising values for a plurality of searchable parameters for financial instruments identified in the financial instrument data;

receiving user-defined search criteria via the computer communications network;

searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the user-defined search criteria; and

returning a representation of at least one of the plurality of financial instruments having values for the searchable parameters satisfying the user-defined search criteria to the user over the computer communications network;

receiving modified user-defined search criteria via the computer communications network;

searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the modified user-defined search criteria; and

returning a representation of a least one of the plurality of financial instruments having values for the searchable parameters satisfying the modified user-defined search criteria to the user over the computer communications network.

58. (currently amended) A server system programmed to perform the following steps:

creating a database of financial instrument data from at least one data source;

creating a database of searchable data from the financial instrument data, said database comprising for each of a plurality of financial instruments values for a plurality of searchable parameters;

receiving user-defined search criteria via a computer communications network;  
searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the user-defined search criteria; and  
returning a representation of at least one of the plurality of financial instruments having values for the searchable parameters satisfying the user-defined search criteria to the user over the computer communications network;  
receiving modified user-defined search criteria via the computer communications network;  
searching the database of searchable data for financial instruments having values for a plurality of searchable parameters that satisfy the modified user-defined search criteria; and  
returning a representation of a least one of the plurality of financial instruments having values for the searchable parameters satisfying the modified user-defined search criteria to the user over the computer communications network.

59. (original) The server of claim 58, wherein the financial instruments are stock options.

60. (original) The server of claim 58, wherein the financial instruments are stocks.

61. (original) The server of claim 58, wherein the financial instruments are bonds.

62. (original) The server of claim 58, wherein the financial instruments are commodities.

63. (previously amended) The server of claim 58, wherein said step of returning a representation of at least one of the plurality of financial instruments comprises transmitting a representation of the at least one of the plurality of financial instruments over the Internet.

64. (original) The server of claim 58, wherein said step of receiving user-defined search criteria comprises receiving the user-defined search criteria from the Internet.

65. (currently amended) A method of identifying financial instruments meeting user-defined investment criteria to a user, comprising the steps of:

①  
presenting to a user a set of searchable parameters;  
accepting user-defined search criteria for said searchable parameters;  
transmitting the user-defined search criteria to a server for searching for financial instruments having values for the searchable parameters corresponding to the user-defined search criteria;  
accepting from the server a set of financial instruments having values for the searchable parameters matching the user-defined search criteria; and  
presenting to a user the set of financial instruments having values for the searchable parameters matching the user-defined search criteria;  
accepting modified user-defined search criteria for said searchable parameters;  
transmitting the modified user-defined search criteria to a server for searching for  
financial instruments having values for the searchable parameters corresponding to the user-  
defined search criteria;



accepting from the server a set of financial instruments having values for the  
searchable parameters matching the modified user-defined search criteria; and  
presenting to a user the set of financial instruments having values for the searchable  
parameters matching the modified user-defined search criteria.

66. (original) The method of claim 65, wherein the financial instruments are stock options.

67. (original) The method of claim 65, wherein the financial instruments are stocks.

68. (original) The method of claim 65, wherein the financial instruments are bonds.

69. (original) The method of claim 65, wherein the financial instruments are commodities.

70. (original) The method of claim 65, wherein the searchable parameters comprises at least one of the following: open interest; option month; spread between called and not called; price; volume; volatility; price earnings ratio; earnings change; percentage volume change; number of shares; range between high and low values; and put options.

71. (original) The method of claim 65, comprising the further steps of:  
receiving from the user, data for establishing an account; and  
transmitting to the server, the data for establishing an account.

72. (original) The method of claim 65, wherein said user-defined search criteria comprises at least one range of values for said searchable parameters.

73. (original) The method of claim 72, wherein said at least one range of values comprises a maximum value and a minimum value.

74. (original) The method of claim 72, wherein said at least one range of values comprises values greater than a user-defined value.

① 75. (original) The method of claim 72, wherein said at least one range of values comprises values less than a user-defined value.

76. (original) The method of claim 72, wherein said at least one range of values comprises a range of percentages.

77. (original) The method of claim 65, wherein said step of transmitting the user-defined search criteria to a server comprises transmitting the user-defined search criteria over the Internet.

78. (original) The method of claim 65, wherein said step of accepting from the server a set of financial instruments comprises receiving the set of financial instruments from the Internet.

79. (original) The method of claim 65, wherein the user-defined search criteria has been formatted using a Web browser.

80. (original) The method of claim 65, wherein the set of financial instruments is formatted for receipt by a Web browser.

81. (currently amended) A computer-readable medium comprising computer-executable instructions for identifying financial instruments meeting user-defined investment criteria, the computer readable medium being readable by a computer to process the instructions to perform steps comprising:

presenting to a user a set of searchable parameters;

accepting user-defined search criteria for said searchable parameters;

transmitting the user-defined search criteria to a server for searching for financial instruments having values for the searchable parameters corresponding to the user-defined search criteria;

accepting from the server a set of financial instruments having values for the searchable parameters matching the user-defined search criteria; and

presenting to a user the set of financial instruments having values for the searchable parameters matching the user-defined search criteria;

accepting modified user-defined search criteria for said searchable parameters;

transmitting the modified user-defined search criteria to a server for searching for financial instruments having values for the searchable parameters corresponding to the user-defined search criteria;

accepting from the server a set of financial instruments having values for the searchable parameters matching the modified user-defined search criteria; and

presenting to a user the set of financial instruments having values for the searchable parameters matching the modified user-defined search criteria.

D 82. (previously amended) The method of claim 22 wherein the step of receiving user-defined search criteria for said searchable parameters comprises the step of receiving user-defined search criteria for at least one of the following searchable parameters: spread between called and not called; percent if not called; percent if called; volume; open interest; stock price; in the money; and out of the money.

83. (previously amended) The method of claim 82, wherein the step of presenting to a user the set of financial instruments comprises the step of compiling a list of stock options, wherein the list identifies for each stock option at least one of the following: stock name; stock symbol; option symbol; strike month; strike price; bid; volume; open interest; percent if not called; and percent if called.

84. (previously amended) The method of claim 47 wherein the step of receiving user-defined search criteria comprises the step of receiving user-defined search criteria for at least one of the following searchable parameters: spread between called and not called;

percent if not called; percent if called; volume; open interest; stock price; in the money; and out of the money.

85. (previously amended) The method of claim 84, wherein the step of returning a representation of at least one of the particular financial instruments comprises the step of returning a list of stock options, wherein the list identifies for each stock option at least one of the following: stock name; stock symbol; option symbol; strike month; strike price; bid; volume; open interest; percent if not called; and percent if called.

86. (previously amended) The method of claim 59 wherein the step of receiving user-defined search criteria comprises the step of receiving user-defined search criteria for at least one of the following searchable parameters: spread between called and not called; percent if not called; percent if called; volume; open interest; stock price; in the money; and out of the money.

87. (previously amended) The method of claim 86, wherein the step of returning a representation of at least one of the plurality of financial instruments comprises the step of returning a list of stock options, wherein the list identifies for each stock option at least one of the following: stock name; stock symbol; option symbol; strike month; strike price; bid; volume; open interest; percent if not called; and percent if called.

88. (previously added) The method of claim 66 wherein the step of accepting user-defined search criteria for said searchable parameters comprises the step of accepting user-

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defined search criteria for at least one of the following searchable parameters: spread between called and not called; percent if not called; percent if called; volume; open interest; stock price; in the money; and out of the money.

D 89. (previously added) The method of claim 88, wherein the step of presenting to a user the set of financial instruments comprises the step of presenting a list of stock options, wherein the list identifies for each stock option at least one of the following: stock name; stock symbol; option symbol; strike month; strike price; bid; volume; open interest; percent if not called; and percent if called.